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Croatia

Exporter Guide

Annual

2008

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Report Highlights:
Croatia imports a significant portion of the food it consumes. The prospect of EU accession, the country's steady growth in tourism, and continued economic reform could make Croatia a significant long-term importer of certain U.S. food products, including the following: seafood, snack foods, pork, pet food, wine, tree nuts, rice and beef. Croatian consumers are strongly anti-biotech.

Includes PSD Changes: No
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I Market Overview

Economic Situation

On October 3, 2005, Croatia began negotiations for accession into the European Union (EU) and since then the Government of Croatia has made significant progress in their agenda to finalize negotiations with the European Union and also to obtain full NATO membership that provides a security framework for its improving economic and social prospects. Today EU regulations are increasingly being viewed as the norm, and there is a concerted effort to prepare the country, especially in the agricultural and processed food sectors, for membership. Croatia is also a member of the WTO and has trade agreements with EU-27, EFTA, Turkey and CEFTA.

Croatia progressed considerably in creating a market economy and establishing macroeconomic stability. Unemployment appears to have peaked in 2000/2001 and positive trends (more employment in private sector firms) began in 2002 and continued through 2006 and 2007. GDP is also steadily growing from year to year but unfortunately, Croatia's gross external debt is also growing with it being at EUR 32,929 million in 2007. Economic growth this year is projected by analysts to be lower than 2007 in keeping with an anticipated slowdown in European economies. With the Kuna closely tied to the Euro, Croatia enjoys a stable currency, but is not immune to global economic trends.

Demographic Developments and Their Impact on Consumer Buying Habits

Croatia’s population is about 4.4 million and is stable. The age distribution is as follows: 0 to 14 years/17.10 percent; 15 to 64 years/67.20 percent; 65 and over/15.70 percent (census 2001). The number of elderly and retired persons is rising, but they tend to have small pensions (the elderly are not the economic force they are in other countries).

Food Expenditures

In 2006, total consumption of goods per household was $11,895 (Kn 69,457). From that total consumption 32.63 percent was a total food and beverage consumption per household. In addition, alcoholic beverages and tobacco amounted to 3.67 percent out total household consumption, which is 8.25 percent decrease compared with 2005. Household consumption of foods and beverages increased by 13.6 percent in 2006 as compared to 2001.

Size and Growth of the Consumer Foods Market

General

In 2006, distribution trade (including total wholesale and total retail sales and including VAT) amounted to Kn 244.95 billion ($ 41.95 billion), which was almost 8 percent increase compared to 2005. In 2005, wholesale trade in the following items: cereals, flowers and plants, live animals, hides, skins, leather, raw tobacco, fruits and vegetables, meat and meat products, dairy products and eggs, alcoholic and other beverages, tobacco products, sugar, chocolate, sugar confectionary, coffee, tea, spices, fish, clams and crabs and other food products excluding VAT was Kn 22 billion ($ 3.7 billion). Additionally, in 2005 retail trade in the following items: fruits and vegetables, meat and meat products, fish, clams and crab, bread, cakes, flour confectionary, sugar confectionary, alcoholic beverages, other beverages, tobacco products and other food products excluding VAT was Kn 28 billion ($ 4.7 billion).

In 2007, Croatia imported agricultural products and fish (HS 1 – 24) valued at $2.136 billion and exported $1.308 billion worth of these goods, which puts the agricultural trade deficit at

$828 million. In the last few years, Croatia's food imports grew as did the country's trade deficit.
There is little specific data on sales of food products by class or type.

Consumer foods

Croatia's total imports in this category have been steadily growing to over $1.305 billion in 2007. In the last few years flourishing tourism at the Dalmatian coast and rebounding consumer demand in urban areas are fueling demand for consumer foods which is underlined by the increasing number of supermarkets.

Trade statistics on American exports to Croatia in this category are severely understated due to transshipment via the EU. Demand for medium to high quality consumer foods will continue to rise and should be a boon for American companies, provided they can overcome less than competitive high ocean freight rates into the Adriatic Sea from U.S. ports. Nevertheless, U.S. companies can take advantage of the weak dollar.

Beverages

Fruit and vegetable juice imports in 2007 were $21.5 million, up about 30 percent compared to 2005, and continuing a constant steady growth.

In 2006, annual average consumption per household member was:

coffee 3.53 kg ,
tea 0.31 kg ,
cocoa 0.32 kg,
mineral water 31.96 kg,
soft drinks 10.56 kg,
fruit juices 16.24 kg,
syrups and concentrates 4.85 kg or l,
spirits 0.74 l,
wine 10.03 l,
sparkling wine 0.08 l,
beer 19.60 l,

Food service (restaurants)

According to the Croatian Statistical Institute, hotels and restaurants sales for foods, non-alcoholic and alcoholic drinks totaled Kn 4.19 billion ($717million) in 2006. Sales in this sector have been trending upwards (despite the slide of the dollar) from 2000 to present.

Seafood

In spite of Croatia's lengthy Adriatic coastline, the country struggles to catch and produce seafood. Croatia lacks modern vessels, as well as the infrastructure needed to transport and process seafood (cold storage chain is not complete). Consumption of sea and fresh water fish in 2006, according to Croatian Statistical Institute, was 7.19 kilograms per capita plus additional 0.85 kg per capita of seafood and 1.01 per capita of dried, smoked, salted and other preserved or processed fish. This shows that Croatians themselves are not big consumers of fish. In general Croatians prefer to consume meat. Nevertheless, the demand for seafood is increasing, as Croatia becomes a more popular tourist destination.

As a result total, imports of fish and seafood in 2007 were about $119 million, a significant increase compared to $70.7 million in 2004. This is a signal that Croatia could be an excellent market for U.S. seafood.

Advantages and Challenges of U.S. Suppliers in the Croatian Market

Advantages	Challenges
Growth in tourism	Negative attitude towards foods containing or made from biotech products
Urban population growth	Reservations towards products with chemical food additives
Certain fruits, vegetables, dried fruits and rice are not produced domestically	U.S. food products are at a tariff disadvantage compared to goods from the countries with which Croatia has bilateral agreements (EU-27, EFTA, Turkey and CEFTA)
Shortages of some agricultural products like beef, pork, soybean meal, and certain types of seafood	High shipping costs
Most importers speak English	Lack of awareness of U.S. goods; no concept of U.S. quality by consumers
	The government adopting restrictive EU Phytosanitary regulations

II. Exporter Business Tips

Local Business Customs

Food retailers buy domestic and imported products from wholesalers. The wholesale sector is completely privatized. Restructuring of the retail segment also occurred as retail chains were privatized during 1990s and acquired by larger groups and new private retailers emerged on the market. The retail sector is dominated by foreign supermarket chains like: Billa, Kaufland, DM, Ipercoop, Metro, Mercator, Interspar; and domestic supermarket chains like Konzum, Getro, KTC, Kerum,... Large supermarket chains have their own purchasing sections that buy, store, and distribute foodstuffs centrally. These purchasing units also carry out imports. However, some items are purchased through specialty wholesale importers.

General Consumer Tastes and Preferences

Croatians, in general, reject food that contains or are made from biotech products. Consumers generally will not buy food-containing biotech content even if it is considerably cheaper.

Croatian market research agency carried out a study in May, 2008 on “Food” that among other things researched opinion and knowledge of Croatian consumers on GMOs. In this study, 58% of respondents said that they wouldn't eat GMO food products under any circumstances and 26% of respondents thought that they didn't know enough about GM foodstuffs. The study showed that 90% of respondents think that GM foodstuff must be clearly labeled on the store shelf.

The same agency did a study in 2005 on public opinion on GMOs. In this study, 67% of respondents said that they wouldn't eat GMO food products under any circumstances and only 16% of respondents thought that they didn't know enough about GM foodstuff.

"Gfk – Centar za istrazivanja" agency also released the results of a study conducted in March 2004 on Croatian consumers' perception of pesticides use and biotech content in food. The results indicated that consumers view both pesticide use and biotech content in food as harmful to human health. However, excessive pesticide use was perceived as more harmful than biotech food. On average, women rated biotech foods as more harmful to health as compared to men. Respondents over 60 years of age rated biotech food more harmful as compared to younger respondents. There was an interesting trend among respondents with regard to their education levels. As education levels increased, the harmfulness of excessive pesticide use increased while the harmfulness of biotech content in food decreased. (see GAIN report HR 5001)

According to, "Gfk" research conducted in June, 2008, on the topic of organic foodstuff consumers responded as follows:

- 17% have never heard of organic products
- 88.3% have heard of organic food
- 53% are able to distinguish organic products in shops
- 3% buy organics regularly

For rough regulation on organic products see GAIN report HR8006.

Consumption of "light" or dietary products is increasing. In addition "Gfk" research from 2008 showed that 57 percent of respondents in Croatia have heard of functional foodstuff like omega-3 margarine.

Food Standards and Regulations

See GAIN Report HR8006 Country Report for information on standards and regulations and HR8007 Export Certificate Report for information on export certificates.

General Import and Inspection Procedures

Incoming goods must go through customs storage at transport terminals or airports. After the goods arrive at the customs storage, the importer or freight forwarder should start procedures for checking and clearing goods, which includes special documents that should be sent to the Inspection Departments and the Customs Office. The procedure starts at the Sanitary Inspection Department of the Ministry of Health and Social Welfare, which checks all products (except meat, which is checked by Veterinary Inspection Department from the Ministry of Agriculture, Fishery and Rural Development). From time to time samples are taken for food safety testing. Products are also inspected for quality. Products that can be made from biotech products are also sampled and sent to the laboratory for testing (see GAINS report, 5 Biotech Annual). The importer must pay for product inspections. If products are of suspicious quality and/or health standards their sales will be banned until analyses is conducted. Customs clearance and removal from storage is carried out under the supervision of a customs officer who compares the documents with the commodities after they were checked for quality and a sanitary or veterinary inspector checks for quality, ingredients and health standards.

Customs rates can be found at:

http://www.carina.hr (This web site is only in Croatian. For clarification, contact your Croatian partner or one of freight forwarding companies to determine the proper rates.)

Customs import documents should be in Croatian, but documents in English language are accepted most of the time.

Average length of customs clearance for food products, if all documents are in order, is one day.

III. Market Sector Structure and Trends

Retail Sector Key to High Value Imports

The internationalization of the Croatian retail food trade started in 1997, with the opening of the supermarket chain (Drogerie Markt). In eight years time, supermarkets have developed rapidly in Croatia, leaving the traditional retail system for food far behind. In 2002, the share of supermarkets in overall food retailing reached 50% according to a study entitled "Rapid Rise of Supermarkets" put out by the U.S. Agency for International Development in September 2003. Croatia's total imports of consumer foods have been steadily growing to over $1.305 billion in 2007 and increasingly, imports are being distributed through large supermarkets. Until recently, small shops dominated food retailing in Croatia. However, currently most consumers shop at supermarkets.

Promotion and Marketing Strategies

A media campaign is considered necessary for the success of any new food product. In that respect advertising is a very important marketing tool in Croatia. Businesses use all available media like internet, radio, billboards, newspapers, magazines and TV, although television is the food industry's favorite media. Supermarkets also use direct marketing by mostly mailing flyers. Consumer participation contests on TV and radio are also very common.

Tourism Sales

Tourism, although highly seasonal, is an important economic activity in Croatia. Each year about 7 - 11 million tourists visit Croatia (compared to Croatia's population of four million). Despite global trends, Croatia is one of the rare countries that has not recorded a decrease in tourist income. Tourist turnover is expected to increase further. In 2007, Croatia's tourism industry recorded about 8 percent more tourists and about 5.7 percent more over night stays in comparison to the previous year. In 2007, 11.2 million tourists visited Croatia with a total of 56 million overnight stays.

In 2006, foreign tourist's overnights represented 88.7 percent of the total number of overnights. The majority of visitors come from Germany, Italy, Slovenia, Austria, Czech Republic, Hungary, UK, France, Netherlands and Bosnia and Herzegovina. Tourists coming from countries outside of Europe are mostly Americans. Tourist infrastructure is satisfactory but still developing, particularly in the main tourist destinations.

Internet Sales

Internet shopping in Croatia is still negligible. Most of the Internet shopping in Croatia includes the following: travel services, IT equipment, books, and electrical appliances. Despite this, there are a few companies providing online sales of retail food products.

While the retail online transactions in Croatia still represent less than 1 percent of total retail trade in the country, e-commerce in Croatia is considered to be a common occurrence. The total value of e-commerce transactions is approximately $ 500 million per year, with around 85 percent of the figure attributable to business-to-business transactions.

IV Best High Value Product Prospects

The consumer food/edible fishery products that offer the best U.S. export opportunities are as follows:

Product Category	Market Size	2007 Imports	5-Yr. Avg. Annual Import Growth (2003-2007)	Import Tariff Rate 2007	Key Constraints of Market Development	Market Attractiveness for USA
Fish & Sea Food (& products)	47,164MT in 2001	$119 million (47,220 MT)	Growth in $ value : 2003/2004 - (-14.6%) 2004/2005 - 37.1% 2005/2006 – 8.1% 2006/2007 – 13.6%	See at: www.carina .hr	Competition from some E.U. seafood exporting countries.	Demand and consumption should continue to grow along with tourism for the next several years.
Snack Foods	N/a	$137million (40.703 MT)	Growth in $ value : 2003/2004 - 19.2% 2004/2005 - 7.5% 2005/2006 – 15.7% 2006/2007 – 21.7%	See at: www.carina .hr	Strict biotech legislation and competition from E.U. and Croatian franchisees.	Growing market.
Pork	110,000 MT in 2002/2003	$112.3 million (35,362 MT)	Growth in $ value : 2003/2004 - 45.6% 2004/2005 - 33.0% 2005/2006 – (-1.58%) 2006/2007 – 3.6%	See at: www.carina .hr	No real trade barriers. They were all abolished in the Summer 2008 but only for companies that are registered exporters of pork for the EU market. Competition from EU companies because of geographical closeness.	Croatian meat processors are importing significant quantities of pork because of volatile situation on the market due to cyclic pig production dependent on the price of feed. In addition, sometimes there is a market shortage of quality product.
Pet Food (Dog & Cat Food-retail)	20,578MT in 2003	$38.5 million (31,081 MT)	Growth in $ value : 2003/2004 - 14.1%	See at: www.carina .hr	Competition from European companies and	Croatia doesn't have pet food. production and

			2004/2005 - 18.6% 2005/2006 – 13.2% 2006/2007 – 18.4%		U.S. franchisees in European Union.	usage of these products is expected to grow with increase in standard of living.
Wine	189,000,000Liters + 5.944 MT in 2001	$26.5 million (15,330 Liters)	Growth in $ value : 2003/2004 - 40.6% 2004/2005 - 4.0% 2005/2006 – 21.6% 2006/2007 – 40.8%	See at: www.carina.hr	New wine law doesn't require expensive testing for wines that come from countries with which Croatia has free trade agreements and TRQs for wine reciprocity.	Consumption of quality wines is expected to grow with standard of living.
Tree Nuts	N/a	$15.2 million (2,491 MT)	Growth in $ value : 2003/2004 - 46.8% 2004/2005 - 26.7% 2005/2006 – (-20.0%) 2006/2007 – 30.3%	See at: www.carina.hr	no	Croatia does not produce sufficient quantities. In addition grading and quantity of domestic production is insufficient.
Rice	10,299 MT in 2003	$8.6 million (10,333 MT)	Growth in $ value : 2003/2004 - 9.8% 2004/2005 - 10.7% 2005/2006 – 10.1% 2006/2007 – 12.3%	See at: www.carina.hr	Transshipments from Europe.	Croatia has no domestic production.
Beef	55,000 MT in 2001	$16.7 million (6,481 MT) – only bovine carcasses and bovine cuts	Growth in $ value : 2003/2004 – 179.4% 2004/2005 – 124.5% 2005/2006 – (-50.2%) 2006/2007 – 45.8%	See at: www.carina.hr	Animals from which the meat is produced should not have been fed with protein of animal origin. Veterinary Certificate needs to certify that fresh meat does not contain, residues of anti-microbial substances and hormones in excess of the limits laid down in valid	Croatia has a shortage.

					Croatian regulation on measures for monitoring certain substances and their residues in live animals and products of animal origin	

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APPENDIX I

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries ($Mil) / US Market Share %	2007	2,041 / 1.12 %*
Consumer Food Imports From All Countries ($Mil.) / US Market Share %	2007	1,305 / 1.38%*
Edible Fishery Imports From All Countries ($Mil) / US Market Share %	2007	119 / 4.07%*
Total Population (Millions) / Annual Growth Rate per 1000 Inhabitants	2006	4,440/-2.0
Urban population (Millions) / Annual Growth rate (%)	2007	n.a.
Number of Major Metropolitan Areas	2007	-
Size of the Middle Class (Millions) / Growth Rate (%)	2007	n.a.
Per Capita Gross Domestic Product (US Dollars)	2007	$ 11,543.9
Unemployment Rate (%)	2007	9.6%
Per capita Food Expenditures (US Dollars)	2006	$ 1,323
Percent of Female Population Employed	2007	36.5%
Exchange Rate (US$1 = X.X local currency)	2007	$1=Kn 5.3660**

* Source: Global Trade Atlas

** dollar slide from $1=8.3392 in 2001

TABLE B. IMPORTS OF AGRICULTURE, FISH & FORESTRY PRODUCTS

Croatia Imports (In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S Market Share		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
CONSUMER-ORIENTED AGRICULTURAL TOTAL	580	748	883	10	13	16	2%	2%	2%
Snack Foods (Excl. Nuts)	60	76	90	1	1	1	0.91 %	0.21 %	0.53 %
Breakfast Cereals & Pancake Mix	5	8	11	1	1	1	0.27 %	0.13 %	0.06 %
Red Meats, Fresh/Chilled/Frozen	47	55	88	0	0	0	0%	0%	0%
Red Meats, Prepared/Preserved	22	27	32	1	0	1	0.33 %	0%	0.15 %
Poultry Meat	3	3	6	0	0	0	0%	0%	0%
Dairy Products (Excl. Cheese)	36	37	46	1	0	0	0.06 %	0%	0%
Cheese	25	36	45	0	0	0	0%	0%	0%
Eggs & Products	4	5	5	1	1	1	4%	0.02 %	0.08 %
Fresh Fruit	64	83	90	1	1	1	0.00 %	0.00 %	0.04 %
Fresh Vegetables	21	45	45	1	1	1	0.02 %	0.30 %	0.12 %
Processed Fruit & Vegetables	59	76	85	1	1	1	0.88 %	0.56 %	0.67 %
Fruit & Vegetable Juices	11	14	15	1	1	1	0.07 %	4%	7%
Tree Nuts	7	8	11	1	2	3	15%	20%	22%
Wine & Beer	21	31	36	1	1	1	0.15 %	0.19 %	0.13 %
Nursery Products & Cut Flowers	18	24	29	1	1	1	0.04 %	0.05 %	0.30 %
Pet Foods (Dog & Cat Food)	18	21	24	1	1	1	3%	3%	3%
Other Consumer-Oriented Products	162	200	223	7	9	10	5%	5%	5%
FISH & SEAFOOD PRODUCTS	76	82	70	1	2	2	1%	2%	2%
Salmon	1	1	1	1	0	1	2%	0%	2%
Surimi	1	1	1	1	0	0	2%	0%	0%
Crustaceans	4	4	4	1	1	1	0.16 %	0.46 %	2%
Groundfish & Flatfish	8	8	10	1	0	1	0.23 %	0%	0.08 %
Molluscs	10	15	19	1	1	2	9%	6%	9%
Other Fishery Products	53	54	35	1	1	1	0.27 %	1%	0.04 %
AGRICULTURAL PRODUCTS TOTAL	955	1,181	1,373	22	21	27	2%	2%	2%
AGRICULTURAL, FISH & FORESTRY TOTAL	1,183	1,475	1,686	24	23	29	2%	2%	2%

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

Croatia – Top 15 Suppliers	Import		
	2005	2006	2007
	$1,000	$1,000	$1,000
Italy	134,857	139,663	174,605
Germany	104,431	115,715	152,639
Austria	76,408	76,197	89,473
Netherlands	65,732	70,169	85,447
Slovenia	67,599	64,066	72,546
Poland	45,148	50,474	59,372
Hungary	55,609,948	50,728	57,958
Bosnia & Herzegovina	34,015	41,523	53,743
Spain	40,880	41,816	48,248
Brazil	17,483	17,403	33,699
Macedonia	19,656	23,413	30,540
Czech Republic	17,612	16,702	27,112
Ecuador	17,980	18,270	24,674
Denmark	22,389	22,037	24,605
France	16,273,310	18,350	24,510
19.United States	11,694	12,395	16,130
World	900,680	945,775	1,175,411

Source: World Trade Atlas

FISH & SEAFOOD PRODUCTS

Croatia - Top 15 Suppliers	Import		
	2005	2006	2007
	$1,000	$1,000	$1,000
Spain	15,973	15,793	27,472
Italy	6,586	8,132	10,575
Falkland Islands	8,547	7,206	8,608
Norway	5,452	5,045	6,911
Sweden	5,402	7,595	6,672
Morocco	899	1,197	6,312
Thailand	5,282	5,536	5,738
United States	2,727	3,683	4,848
United Kingdom	2,545	2,658	3,627
France	9,853	10,145	3,259
Denmark	5,429	3,498	3,147
Argentina	4,877	5,527	3,062
Iceland	2,279	4,251	2,998
Netherlands	1,747	3,063	2,560
China	623	2,032	2,325
World	96,886	104,757	119,011

Source: World Trade Atlas